

How to Simplify the Modern Sales Cycle



The sales cycle has grown exponentially more complex.

Where once there were only a handful of touchpoints, customers are now engaging with companies on dozens of channels and require more information and guidance than ever before to make a purchase decision.

Managing this new sales cycle can present a major challenge to sales teams unaccustomed with its new scale and complexity. It requires a deeper understanding of the process, along with the right tools to manage it. A CRM solution like Salesforce can deliver both.

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The New, More Complex Sale

The simple image of a funnel no longer does the sales process justice. The Internet has added a new wealth of touchpoints for a customer to contact a company and managing all of those channels requires a cohesive strategy and system. The challenges don't stop there however.

Companies also need to organise leads from all of these disparate sources into one cohesive pipeline. Once leads are in a company's pipeline, salespeople need to have the right information at the right time to close a deal. Even after a deal has closed, the job isn't done. Modern companies need to have a complete picture of a customer journey to deliver exceptional service.

Sound like a lot to handle? Don't stress. A CRM solution like Salesforce makes all of this effortless, and this e-book will show you how. The following pages will outline exactly how a CRM solution can streamline the sales process in the following areas:



Generating more leads



Closing the deal



Optimising lead flow



Providing 360-degree service

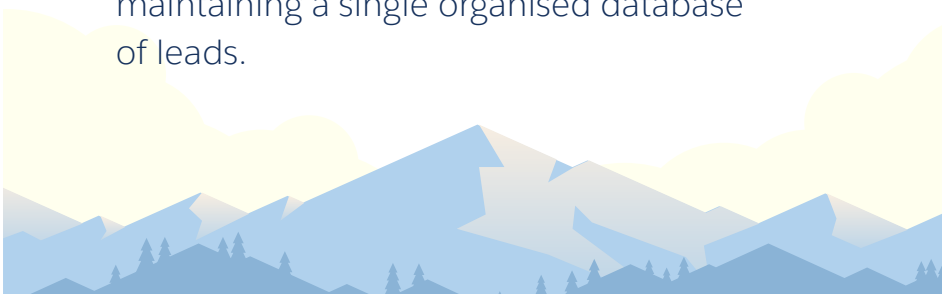
Let's get started!

CHAPTER 1

Generate More Leads

With access to more channels than ever before, companies can dramatically increase their reach and the number of touchpoints they have with a consumer. But more opportunity means that companies must cast a wider net, tailoring their approach on each channel.

CRM solutions like Salesforce allow you to adjust your lead-generation strategies across your website, sales activities, and organic channels. Each channel inherently requires a unique approach and a CRM affords you the flexibility to customise your operation for each channel while still maintaining a single organised database of leads.





Website

The Internet is now the primary business driver for nearly every industry. From organic traffic to your website, to paid promotions and banner ads, a company's reach is virtually limitless. Driving all of this traffic to a series of web forms on your website is a great way to start collecting information on potential customers. The fields from these forms are sent directly to a CRM solution and used to start building a comprehensive database of legitimate opportunities for the business.



Sales Activities

No matter what new technology comes along, sales teams will always be the heavy lifters in the lead generation arena. With cold calls, referrals, and email marketing, sales reps can identify viable sales opportunities and add them to their CRM solution. A CRM allows a sales team to see if a lead has already been created and whether anyone else is working a deal with the same company. A CRM solution turns the separate activities of your sales team into one cohesive database that feeds your sales process.



Organic Channels

Social media sites like Facebook and LinkedIn are valuable opportunities to drive business leads as well. As a company builds its social media audience with valuable content and engagement, it can begin to entice its followers to convert into leads via web forms that promote events, offers, and content.

PLAN AND EXECUTE MARKETING CAMPAIGNS

- Google Search
- Email Marketing
- Online Ads
- Social Ads
- Partners
- Content Marketing
- Events
- Trade Shows
- PR
- Cold Calls



Website Visitors

- Organic web traffic
- AdWords referrals
- Email responses



Web Form

- “Contact me”
- Free trial
- Event registration



Inbound Calls

- Yellow pages
- Google Maps
- Word-of-mouth referrals



Create New Lead

- Search Salesforce for lead
- If one doesn't exist, create a new lead



Organic Views

- Social networks
- Content marketing
- Online communities



Web Form

- Social networks
- Content marketing
- Online communities



Marketing Automation

Set up auto-response emails

- “Thank you for your interest”

Lead Scoring

- Geography
- Company size
- Product of interest

Assignment Rules

- Lead score
- Geo
- Buying stage

CHAPTER 2

Optimise the Lead Flow

With a well-organised lead-generating machine, companies need to develop workflows to manage the diverse new influx of sale opportunities. Without a system in place to manage all these leads, a sales team can be thrown into chaos.

This is where a CRM solution like Salesforce can help. With marketing automation technology to handle much of the organisational grunt work, and tools to keep everything neat and orderly, a company can harness its inflow of leads to start driving business results.





Marketing Automation

Before a lead even makes it to a salesperson, marketing automation tools like Pardot can automatically handle most of the administrative work. Traditionally, every inbound lead would have to be researched and vetted by a member of the sales team, but no longer. With automation tools, leads can be automatically scored and graded by how well they fit a company's ideal lead profile. Bad leads can be added to lead-nurturing journeys, while good leads can be routed to the appropriate salesperson based on location, industry, or business type.



Establishing a Lead

With a CRM solution in place to manage leads, salespeople enjoy an incredible degree of transparency. They can see if a lead already exists in the database, who else from the same company is already a lead, and the complete activity history of a new lead. This way your sales team is dividing and conquering one database of leads instead of working separately in their own silos.



Contacting a Lead

Once a lead has been qualified and looks like a good fit, a salesperson needs a coherent strategy for approaching that lead. Creating tasks is an easy way to keep salespeople organized and on top of all their active deals. Access to lead information and the last account activity also allows a salesperson to have one-to-one interactions with a lead that can make it feel like you just spoke with them yesterday.



My Open Leads

Set up different views to manage your leads. For example, “Today’s Leads” or leads sorted by lead type.



Duplicate Lead?

The “find duplicate” button searches for similar leads or contacts in Salesforce.

If a lead turns out to be a duplicate, easily merge the two records.

Salesforce has a number of [AppExchange](#) partners that provide high volume de-duplication and data cleansing tools.



Working Leads

When you’re working a lead, you’ll set up a series of tasks, which might vary based on the type of lead. For example:

DAY 1: Personalise mass email

DAY 2: Call/voicemail

DAY 4: Call/voicemail

DAY 7: Personalise mass email



YES



Establish Contact?

It is becoming more difficult than ever to contact a lead.

It may take several attempts and various tactics to establish a relationship.

Qualified?

Create a set of qualification questions, such as current situation, product of interest, timeframe, key decision makers.

If the lead is qualified, convert it into a contact, with an associated opportunity and account.

NO

NO

Keep an archive of dead leads. Use lead nurturing and call downs to re-market.



CUSTOMER SPOTLIGHT:

Zero Motorcycles

Zero Motorcycles, the world's leading manufacturer and retailer of electric motorcycles, is out to disrupt the motorcycle industry. When they looked for ways to streamline their business processes and communication, they found Salesforce was the all-in-one platform they needed to increase efficiency and maintain their rapid growth.

[READ MORE >](#)

“All the information I need to operate on a day-to-day basis is at my fingertips.”

– Mike Cunningham, Director of US Sales,
Zero Motorcycles

CHAPTER 3

Close the Deal and Provide 360-Degree Service

Moving a deal to close requires a tremendous amount of organisation, persistence, and timing. The modern sales professional can never drop the ball and needs to be able to address her leads' concerns and questions in a matter of minutes, not days.

A CRM solution like Salesforce keeps salespeople organised and up to date so they can be at peak performance for every deal. They can be ultra-responsive during negotiations and exceed their leads' expectations at every turn.





Track Opportunities

Prioritising time is now a must-have skill for the modern sales professional. A CRM makes this much easier by providing opportunity reports and dashboards to keep track of top deals and opportunities. Now salespeople can allocate their time where it will do the most good.



Always Be Prepared

With collaboration at its core, a CRM solution allows you to leverage the collective intelligence of your entire organisation for every deal. With easy file sharing, you'll always have access to the most up-to-date information and pitch decks. If a lead asks you a tricky question, you can find the person in your organisation who knows the answer in seconds, whether they're across the office or across the globe. The days of the lone wolf sales rep are over, and this means you can now bring the resources and knowledge of your entire organisation to bear on every deal.



Close the Deal

Getting a deal past the finish line is often the most arduous part of the entire process. Using a CRM solution, especially one with a mobile app like Salesforce1, allows you to be ultra-responsive during negotiations, never creating a delay. Easy collaboration and communication directly in the tool makes adjusting pricing or consulting the legal team a breeze. With electronic signatures, you can also close a deal from anywhere.

Customer service and support is now just as much a part of the sales cycle as sales and marketing are. Customer retention is crucial to every company, and providing full 360-degree service requires one central view of the customer and their information, all the way from the first marketing touchpoint through their last customer service request.

Customers expect more from the companies they patronise than ever before. Interactions should be personalised and tailored at every point in the sales process and beyond. This requires breaking down traditional departmental silos and connecting previously separate stores of data. A CRM solution is the foundation that can help make this happen.



Marketing

Understanding the marketing channels through which your customers prefer to interact with your company is valuable information, even outside the marketing department. If you are looking to tap into your existing customers to spread the word about your company, knowing the channels on which they are active is a huge advantage. If you are revisiting your marketing strategy, knowing which channels sourced your most loyal customers can help give you a much clearer picture of what's working. A CRM solution puts all of this data just a few clicks or taps away.



Sales

For years, the data gleaned during the sales cycle was largely ignored. The only thing that mattered was who helped close the deal so finance would know where to send the commission check. Modern companies know better, and are putting sales data to good use. If you are looking to improve your team's performance, being able to see every activity your top performers are logging is incredibly helpful. If you are looking to upsell your existing customers, being able to reach out to a company with a sales rep they already know dramatically increased the likelihood of success.



Service

Customer service has always been a pain point for customers of nearly every company. However, with a CRM solution a service team has access to a treasure trove of information that can make the customer service process personalised, efficient, and painless. Access to service records, marketing and sales experiences, and product information means service experiences are no longer disconnected one-offs, but an enjoyable part of one cohesive experience with a brand.



Open Opportunities

You can monitor your opportunity reports and dashboards to keep track of your top deals and prioritise your time.



Presentation

Find a business process that fits your product and sales methodologies and processes,



Proposal

matching the way you already sell.



Negotiation



Won



Keep an archive of dead opportunities. Use lead nurturing and call downs to re-market.



Support



Sales



Marketing

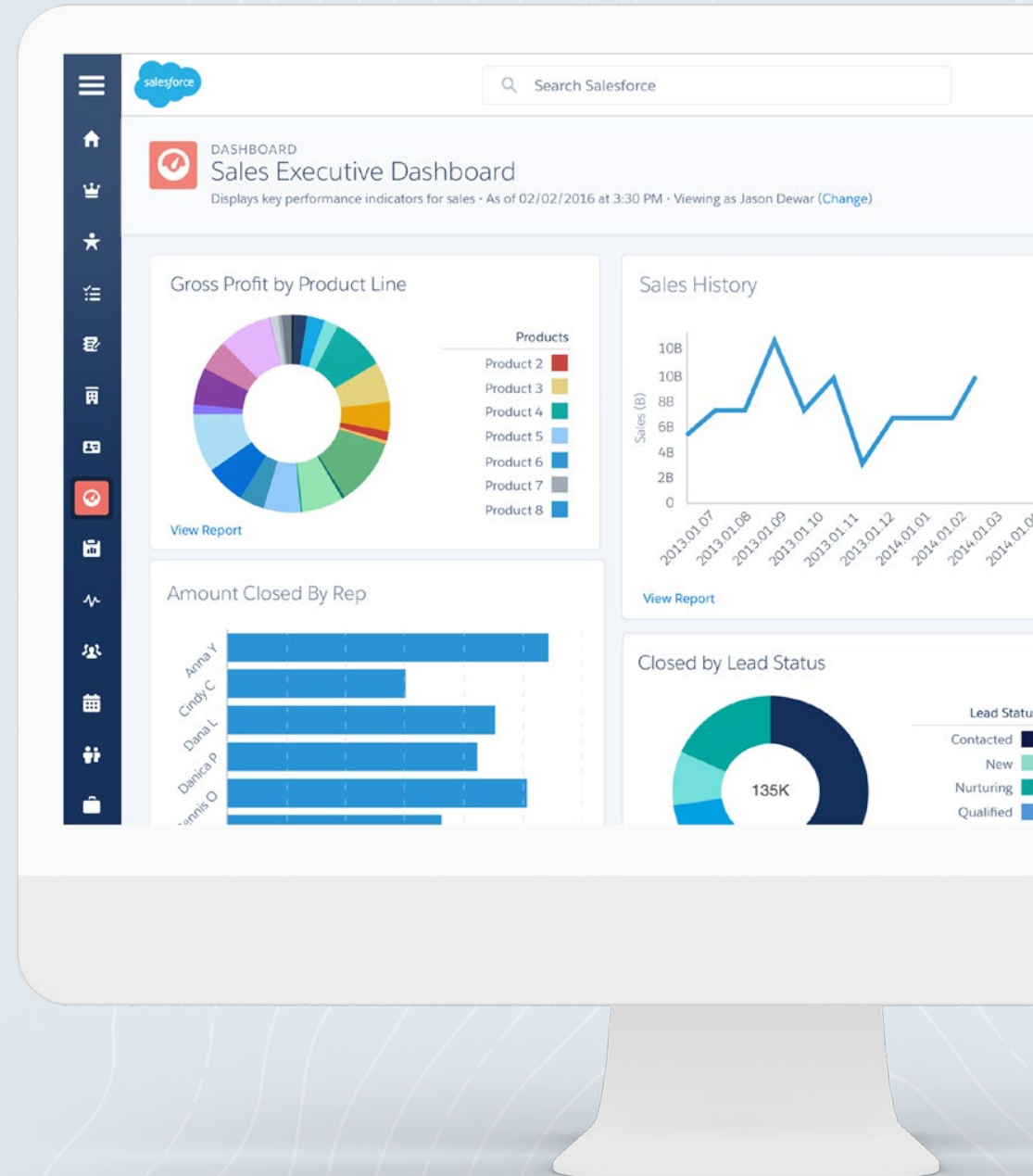
Salesforce gives your entire company a 360-degree view of your customers and facilitates collaboration across your organisation, helping you build strong, lasting customer relationships.

CONCLUSION

Technology has dramatically changed the face of the average sales cycle. With a host of new engagement channels to monitor, more educated and savvy consumers, and higher expectations than ever before, companies need the right tools to help simplify and streamline their sales cycles.

With the help of CRM solutions like Salesforce, companies can have a complete picture of a customer journey for the first time. New channels can be harnessed to drive more leads than ever before. Lead flows can be optimised to keep your sales team focused on selling. Deals can move faster and close more easily with the right resources and technology and customer expectations can be surpassed easily.

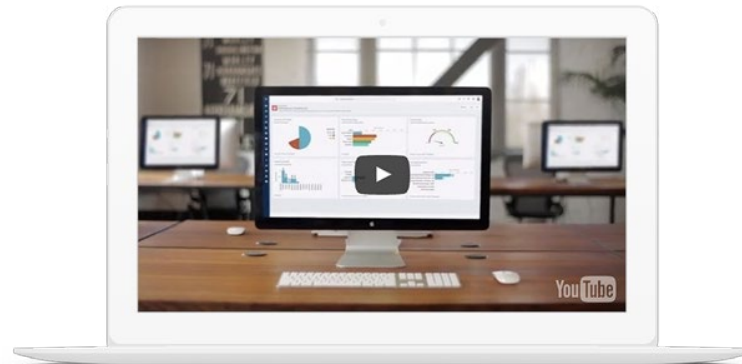
It's time to stop viewing the new sales cycle as a complex obstacle, and instead view it as an opportunity to deliver better marketing, simplify complex sales processes, and generate more business than ever before.



Resources you may like:



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IN A WHOLE NEW WAY



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